Onboarding Internal (Intra-Agency) Department Transfer user guide

Overview

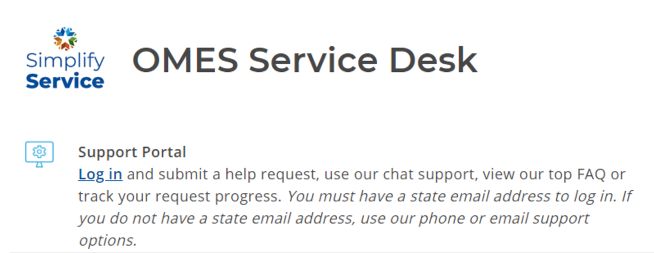
Whenever an employee transfers from one department to another, the hiring agency must submit an Internal (Intra-Agency) Department Transfer request to ensure the employee receives the necessary equipment, access and software to perform their job. This guide walks through the process of completing the onboarding form.

Note: Additional questions may be asked for certain agencies. Please answer accordingly.

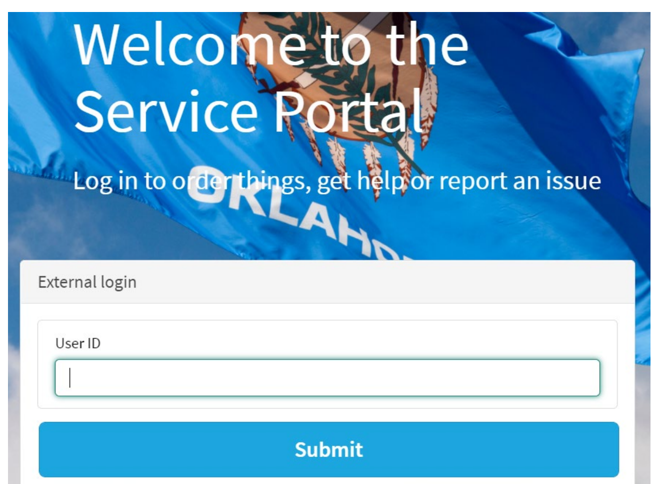
Steps

Step 1: Go to the following website: oklahoma.gov/servicedesk

Step 2: Select the **Login** link within the Support Portal section.

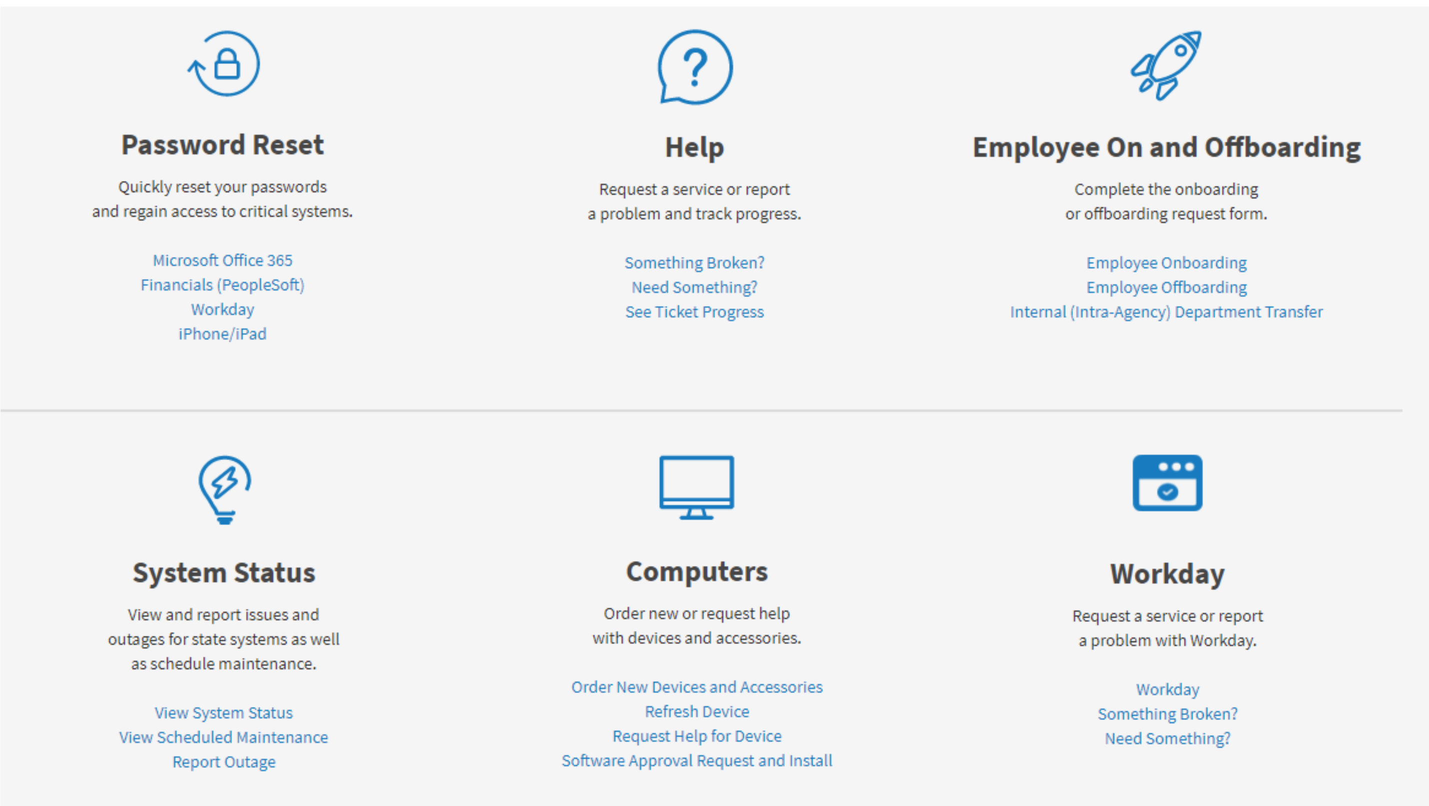


Step 3: The ServiceNow login page will appear. Enter your state email address and select the **Submit** button.



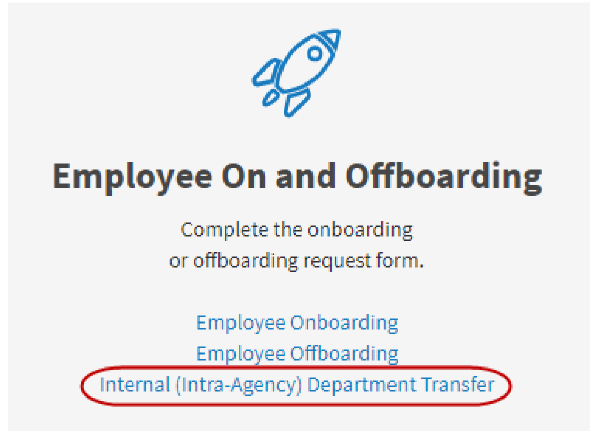
Step 4: Login with your organizational account.

The Service Desk Home Page appears.



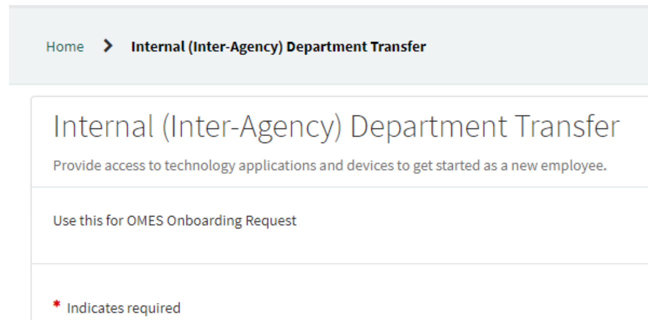
If you do not see the screen above when you login, it means you have a different level of access. You need to go to the following website: https://oklahoma.service-now.com/sp

Step 5: Locate the Employee On and Offboarding box. Select **Internal (Intra-Agency) Department Transfer**.



The Department Transfer Request screen will appear. This is where you will enter the information for the transferring employee.

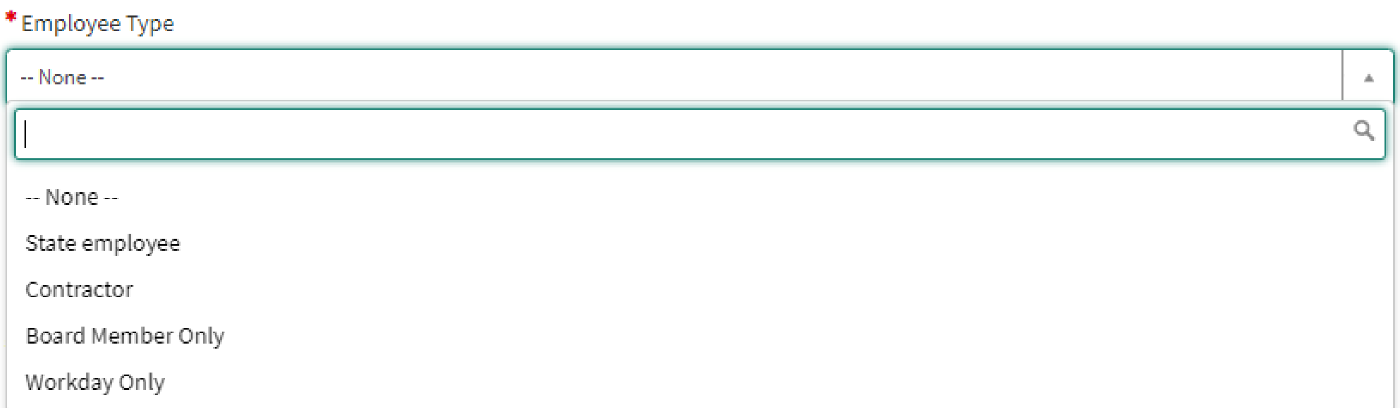
Note: Fields with a red asterisk are required.



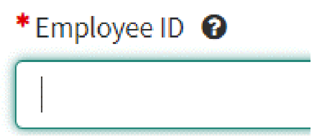
Step 6: Enter the transferring employee's first name, middle initial and last name into the appropriate fields.

Step 7: Enter or select the employee's transfer date.

Step 8: Select the employee type from the dropdown. Are they a state employee, contractor, board member, or Workday only?

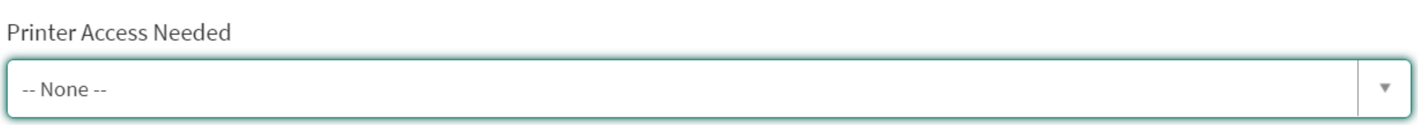


Step 9: If they are a state employee, enter their Employee ID.



Step 10: Select their agency from the dropdown. Complete the other fields for Department To and From and Manager To and From with as much information as you have access to.

Step 11: Does the employee need printer access? Select **Yes** or **No** from the dropdown.



If **Yes** is selected, a Printer IP Address field will appear. Enter the printer's IP address. This can be found on your computer's Printer Properties screen.

* Printer IP Address

Step 12: Does the employee need a scan folder? Select **Yes** or **No** from the dropdown.

Scan Folder Needed

-- None --

If **Yes** is selected, enter the IP address for the scanner or multifunction device. This could be the same as the Printer IP Address above.

Scanner IP Address

Step 13: Does the employee need a phone setup? Select **Yes** or **No** from the dropdown.

Phone Setup Needed

-- None --

If **Yes** is selected, additional phone-related fields will appear. Select the type of phone from the dropdown. This includes a desk phone, a Teams soft phone, In Contact or Reuse existing phone number. If there is a phone number that needs to be reassigned, enter it into the Phone Number field. Any other intructions or details regarding the onboarding employee's phone situation can be entered into the Special Phone Instructions field. Examples of special instructions include needing phone calls forwarded to a phone number or adding the employee to a call group.

Phone Setup Needed

Yes

Type of Phone Service

Reuse existing phone number

Need name change?

-- None --

Voicemail passcode reset?

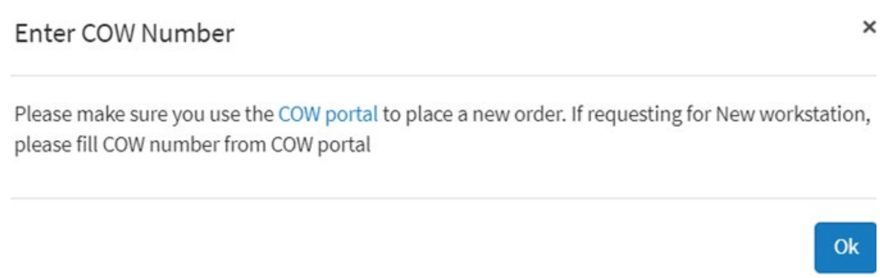
-- None --

Phone Number

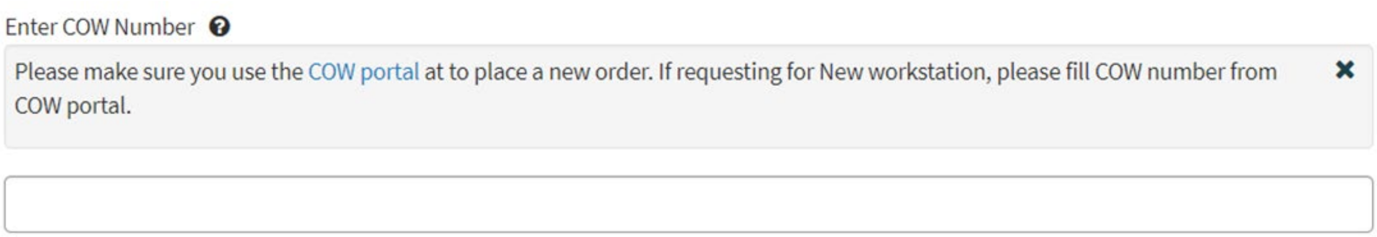
Special Phone Instructions

Step 14: In the Workstation Inventory Type field, select whether the employee will use an existing workstation, if a new one is needed, virtual workstation or None. Select "None" if you do not need any type of support in getting computer setup, i.e. print drivers/software installed. If you select "Use Existing", you will be contacted by a computer support tech to install print drivers and/or software.

If "Order New Computer" was selected, a window will appear reminding you to use the COW portal to place a new order.



Once you have a COW REQ number from the COW portal, enter the COW REQ number into the appropriate field.



Step 15: Does the new employee need to have their Active Directory (AD) account setup similar to a current employee? This means they will require similar permissions. This does not apply to email groups or SharePoint sites/calendars. This is only for Active Directory. Select **Yes** or **No** from the dropdown.

If "Yes" was selected, enter the name of the current employee whose setup should be copied into the Setup User to Copy field.

Step 16: Does the employee need network folder access? If yes, enter the specific server name and folder name.

Network Folder Access

Please provide specific server name and folder name. Default permissions is Read Only. If you need read / write, please indicate as such.

Step 17: Does the new employee need access to a shared mailbox? Select **Yes** or **No** from the dropdown. If “Yes” was selected, enter the mailbox into the “What Mailbox” field.

* Shared Mailbox needed?

-- None --

What Mailbox?

Step 18: Does the employee need any software outside of the standard image? The standard image includes Microsoft Office 365 and Adobe Reader. If additional software is needed, enter it into the Requested Software field.

Requested Software

Step 19: Does the employee need mobile device management? This is required if a state cell phone will be provided. Select **Yes** or **No** from the dropdown.

Needs Mobile Device Management?

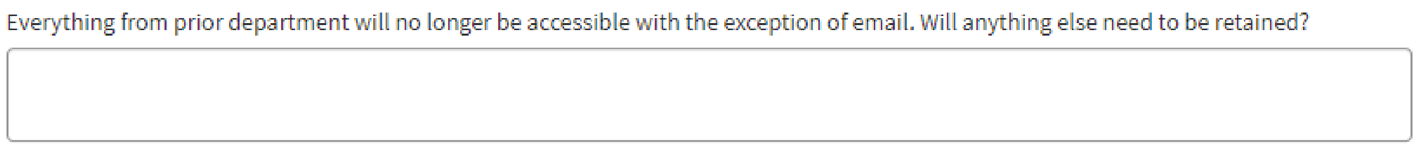
-- None --

Step 20: The Please Provide Any Special Instructions field is a free form field allowing you to enter in anything else that is needed. Examples include being added to a special Active Directory group, shared calendar access, email distribution groups or needing access to a software application that requires permissions not listed above.

Please Provide Any Special Instructions

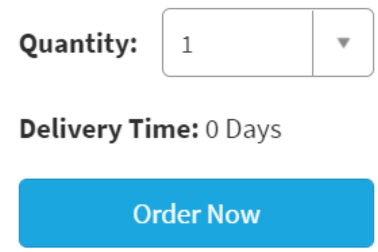
Note: If the new employee/contractor needs an Admin account, please submit a separate request for this permission. It will have to be vetted.

Step 21: Does the employee need to retain anything from the previous department, besides their email? If so, list here.

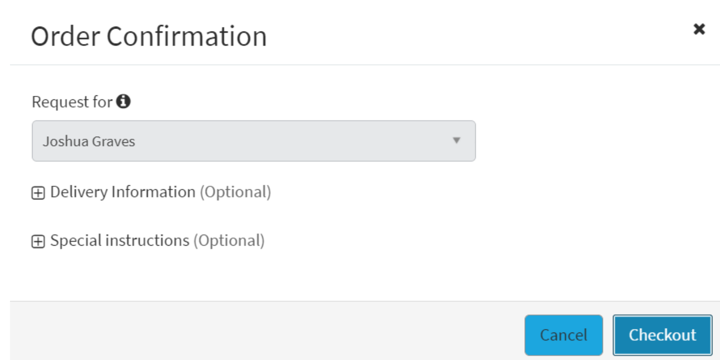


Step 22: Select the **Add attachments** link at the bottom of the form to add any necessary attachments to the onboarding request.

Step 23: When complete, select the **Order Now** button to submit the onboarding ticket to be created and routed to the proper team for processing.



Step 24: An Order Confirmation window will appear. Enter any necessary delivery information or special instructions. Then select the **Checkout** button.



You will receive a confirmation that your request was submitted, including your request number and estimated delivery date.